

Reviewing and Approving Forms – UI Health

The role of the **Approver** in HireTouch is to review the information submitted on a form. After your review, you will determine if the form should be approved, rerouted, or rejected.

As an approver, you have two options for reviewing the forms:

1. Reviewing Forms via the Tasks Tab
2. Reviewing Forms via Email Notification

Definitions

HireTouch Role Name	Definition
Form Originator	Person who initiated/started the form
Task Recipient	Name of user selected on Approvals page of a form as a reviewer
Form Approver	Name of user selected on Approvals page of a form as a reviewer

Option 1: Reviewing Forms via the Tasks Tab

One option for reviewing forms is through the **Tasks** tab in HireTouch. When you are selected as an approver for a form, a task is automatically created for you.

1. Login to the [HireTouch Administrative Application](#).



NOTE: For more information on accessing HireTouch, refer to the **Logging into HireTouch** document.

2. Click the **Tasks** tab on the menu bar.

The screenshot shows the HireTouch PLUS interface. At the top right, it says 'Welcome, MC User1' and 'Logout'. Below that, a yellow box indicates 'Session expires in 59 min' and 'University of Illinois - Chicago'. The navigation menu includes 'HOME', 'APPLICANTS', 'JOBS', and 'TASKS'. The 'TASKS' tab is highlighted with a red circle and a red arrow. Below the menu, a blue bar says 'You are logged in. Welcome, MC User1.' The main dashboard area is titled 'My Dashboard' and contains several sections: 'HIRETOUCH NOTIFICATIONS' (No New Notifications), 'UNIVERSITY OF ILLINOIS - CHICAGO NOTIFICATIONS' (No New Notifications), 'CLOCK' (Monday, November 19th, 2012, 9:41:55 AM), 'LOCAL WEATHER' (Conditions for Chicago, IL at 8:49 am CST, Current Conditions: Cloudy, 46 F, Forecast: Mon - Cloudy, High: 56 Low: 46, Tue - AM Clouds/PM Sun, High: 57 Low: 40), 'VIEWED JOBS' (a table with columns Date, Time, Title), and 'VIEWED APPLICANTS' (a table with columns Date, Time, Name, and a filter dropdown set to 'This Month').

Date	Time	Title
Nov 19	2:15 AM	Staff Nurse I - Surgery
Nov 19	2:08 AM	Administrative Nurse I (Extra Help)
Nov 18	8:44 PM	Staff Nurse II - Operating Room
Nov 16	10:50 AM	*Job Forms Test 3
Nov 16	10:36 AM	*Job Form Test 2
Nov 16	9:39 AM	*Hospital Form Security Test
Nov 16	9:39 AM	*Test
Nov 16	9:37 AM	*Job Form Test
Nov 14	9:21 AM	*Staff Nurse I Test
Nov 13	11:37 PM	*Required Fields Test

A list of tasks assigned to you appears.

3. Highlight the task in the **My Tasks** list.

The screenshot shows the 'My Tasks' interface. On the left, there is a sidebar with a task list and a calendar for November 2012. The main area displays a task table with one entry: ID 16586, Name 'Approval Requested: Position Authorization', Task Type 'Approval Requested: Position Authorization', Priority 'Medium', Status 'Opened', Task Date 'Mon 11/19/12', and Due Date. Below the table, the task details are shown for ID 16586. The 'Link' field contains 'Job Forms', which is circled in red. A red arrow points to this link. The task details also show 'Task Type', 'Priority', 'Status', 'Created', 'Opened', and 'Assigned To' information.

4. Click the **Job Forms** link in the lower-section of the task that displays.

5. Click **Approvals** on the **Show Job Forms** page.

The screenshot shows the 'Show Job Forms' page for 'Staff Nurse I - Surgery'. The page has tabs for 'Properties', 'Applicants', 'Activity', 'Processes', and 'Forms'. The 'Forms' tab is active, showing a table of job forms. The table has columns for 'Form Name', 'Auto Generated Number', 'Status', 'Completed', 'Completion Date', 'Recertify', 'Action', 'Approval', and 'Document History'. One row is shown for 'Position Authorization' with a red checkmark in the 'Completed' column and a red circle around the 'Approvals' link in the 'Action' column. On the right side, there are sections for 'Actions' (Attach a Note, Create a Task), 'Processes' (Position Authorization: Completed 11/19/12, PMC: Pending PMC 11/19/12 Review), and 'Job Details'.

Your name appears in the **Job Form Approval** list for the job

6. Click the **Review** button to view the form information in view-only format.

The screenshot shows a web application interface for reviewing a form. At the top, there are navigation tabs: HOME, APPLICANTS, JOBS, RETRIEVE CS APPLICANTS, and TASKS. Below this, the form title is 'Extra Help Magnetic Resonance Imaging Technologist - Radiology' with a sub-link 'UI Health - Extra Help - Recertified'. There are sub-tabs for Properties, Applicants, Activity, Processes, and Forms. A 'Job Forms | Comments' link is visible. The form is titled 'Form: Extra Help Request - UI Health' with 'Form Originator: Mezydlo, Victoria'. A table below shows columns for Title, Name, Approved, Rejected, Date, and Document. The 'Name' column contains 'Hospital User'. Below the table is a toolbar with buttons: Back, Approve, Review (circled in red), Edit, Approve, Reject, and Download. Below the toolbar, it says '0 NOTES SO FAR' and 'Hospital User said...' with a text input area and an 'Add Note' button.

This allows you to review the data entered in the form to determine if it should be approved or denied.

7. From this view you can:

a. Return to the previous screen by clicking the **Approvals** button.

OR

b. Edit the form by clicking the **Edit** button. This will open the form in an editable window. You can update the form as needed and resubmit the form.

OR

c. Approve the form by clicking the **Approve** button.

OR

d. Reject/Reroute the form by clicking the **Reject** button.

OR

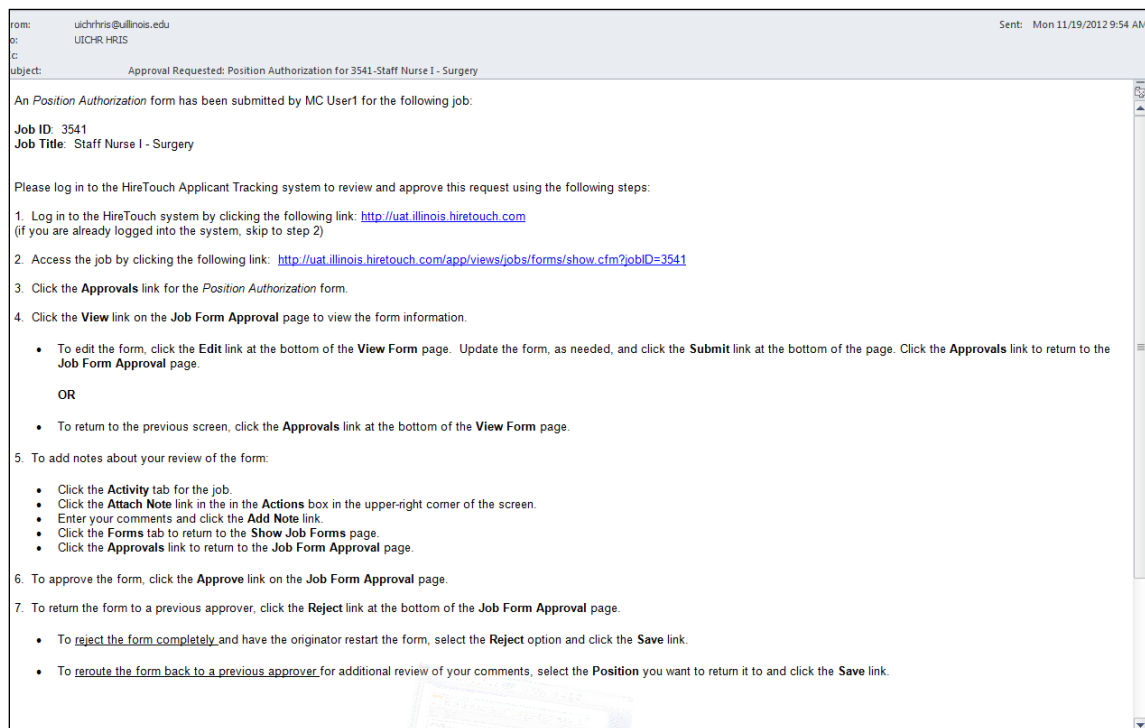
e. Review a PDF version of the form by clicking the **Download** button.

This screenshot shows a toolbar with five buttons: Approvals, Edit, Approve, Reject, and Download. These buttons are enclosed in a red rectangular box. To the right of the toolbar, there is a table with three columns: Position, Name, and Status Date. The table contains three rows of data: Originator (Victoria Mezydlo), Hiring Manager (Hospital User), and Administrator/Chief Line (Hospital User).

Once your review is complete, continue with the appropriate steps in the *Post-Review Options: Approve, Reroute, or Reject* section later in this document

Option 2: Reviewing Forms via Email Notification

Another option for reviewing forms is via email notification. When you are selected as an approver for a form, you automatically receive an email notifying you that you have an approval to complete. This email contains steps needed to locate the job and approve the form, similar to the sample below.



While the email contains detailed steps for approving a form, you also can follow the steps below to locate the job you need to approve.

1. Login to the [HireTouch Administrative Application](#).



NOTE: For more information on accessing HireTouch, refer to the **Logging into HireTouch** document.

2. Click the **Jobs** tab.

The screenshot shows the HireTouch PLUS interface. At the top right, it says 'Welcome, MC User1' and 'Session expires in 59 min'. The navigation bar includes 'HOME', 'APPLICANTS', and 'JOBS' (which is circled in red with an arrow). Below the navigation bar, there's a 'My Dashboard' section with notification boxes for 'HIRETOUCH NOTIFICATIONS' and 'UNIVERSITY OF ILLINOIS - CHICAGO NOTIFICATIONS'. The main content area is divided into three columns: 'CLOCK' showing 'Monday November 19th, 2012 9:41:55 AM', 'LOCAL WEATHER' for Chicago, IL, and 'VIEWED JOBS' with a list of recent job views. A 'VIEWED APPLICANTS' section is also present, showing 'No record found'.

3. Search for the job in the list and click the job **Title**.

The screenshot shows the 'Nursing Jobs' search results page. At the top, there are tabs for 'HOME', 'APPLICANTS', 'JOBS', and 'TASKS'. Below the tabs, there's a search bar with 'Search' and 'GO' buttons, and a 'Job Status' dropdown menu. The main content is a table with columns for 'TITLE', 'JOB ID', 'DEPARTMENT NAME', 'ORG CODE', 'ORGANIZATION NAME', 'JOB STATUS', 'POSITION AUTHORIZATION', 'PMC', and 'JOB POSTING STATUS'. A red arrow points to the 'Staff Nurse I - Surgery' job title in the first row of the table.

TITLE	JOB ID	DEPARTMENT NAME	ORG CODE	ORGANIZATION NAME	JOB STATUS	POSITION AUTHORIZATION	PMC	JOB POSTING STATUS
Staff Nurse I - Surgery		Surgery	2271001	General Surgery	Pending - PMC Review	●	●	
ANIII- Pediatrics	3538	Pediatrics	2398015	Hosp Pediatrics Nurs	Pending	●	●	
ANI- Labor & Delivery	3536	Labor & Delivery	2398014	Hosp Women/Fam Nurs	Pending	●	●	
Staff Nurse - Nursing	3535	Nursing	2398012	Hospital Nursing Svc	Open	●	●	●
Clinical Nurse 1 - Emergency	3534	Medicine Hospital Emergency	2398001	Hosp Emergency Svcs	Open	●	●	●
Staff Nurse I - Nursing Resource Office	3533	Nursing Resource Office	2398012	Hospital Nursing Svc	Open	●	●	●
ANI- Mother Baby	3532	Mother Baby	2398014	Hosp Women/Fam Nurs	Open	●	●	●
Staff Nursing 1- Rehab	3531	Rehab Nursing	2398023	Hosp Rehab Nursing	Open	●	●	●
Extra Help SNI	3530	Transplant	2398025	Hosp Transplant Nurs	Pending	●	●	
Staff Nurse I - Emergency Services	3529	MEDICINE HOSPITAL	2398001	Hosp Emergency Svcs	Open	●	●	●

Records 1-10 of 50 | First | Previous | Next | Last | Page 1 | Per Page 10

4. Click the **Forms** tab within the job.

- Click **Approvals** in the **Show Job Forms** list.

Form Name	Auto Generated Number	Status	Completed	Completion Date	Recertify	Action	Approval	Document History
Position Authorization			<input checked="" type="checkbox"/>	Mon, 11/19/12 at 1:00 AM		View	Approvals	View History

Your name appears in the **Job Form Approval** list for the job.

- Click the **Review** button to view the form information in view-only format.

Title	Name	Approved	Rejected	Date	Document
Hiring Manager	Hospital User				
Administrator/Chief Line	Hospital User				

This allows you to review the data entered in the form to determine if it should be approved or denied.

- From this view you can:

- Return to the previous screen by clicking the **Approvals** button.

OR

- Edit the form by clicking the **Edit** button. This will open the form in an editable window. You can update the form as needed and resubmit the form.

OR

- Approve the form by clicking the **Approve** button.

OR

- Reject/Reroute the form by clicking the **Reject** button.

OR

- Review a PDF version of the form by clicking the **Download** button.

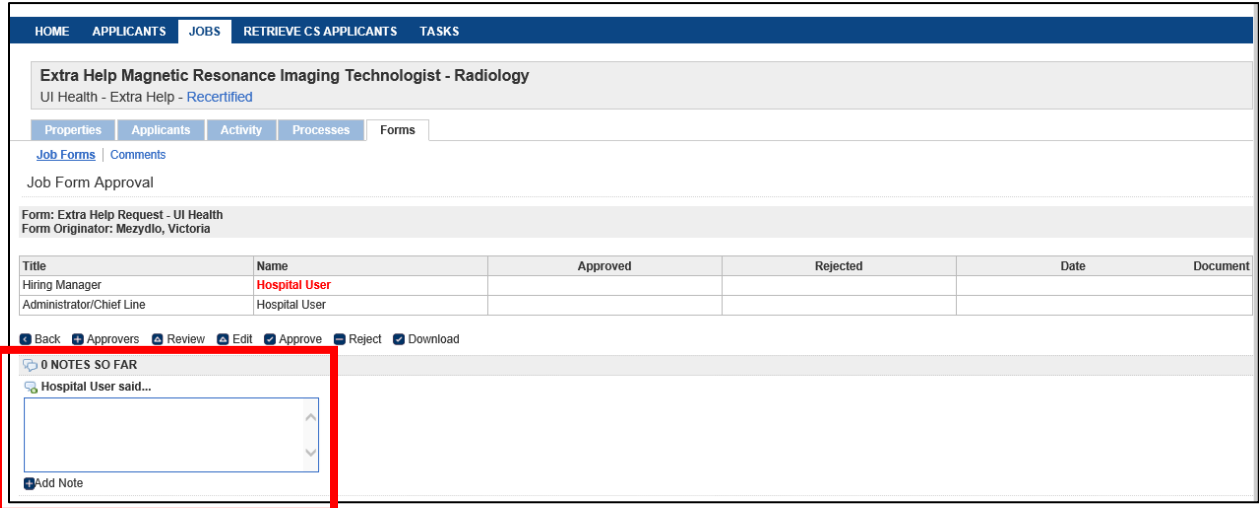
Position	Name	Status Date
Originator	Victoria Mezydio	
Hiring Manager	Hospital User	
Administrator/Chief Line	Hospital User	

Once your review is complete, continue with the appropriate steps in the *Post-Review Options: Approve, Reroute, or Reject* section later in this document

Adding Notes About your Review

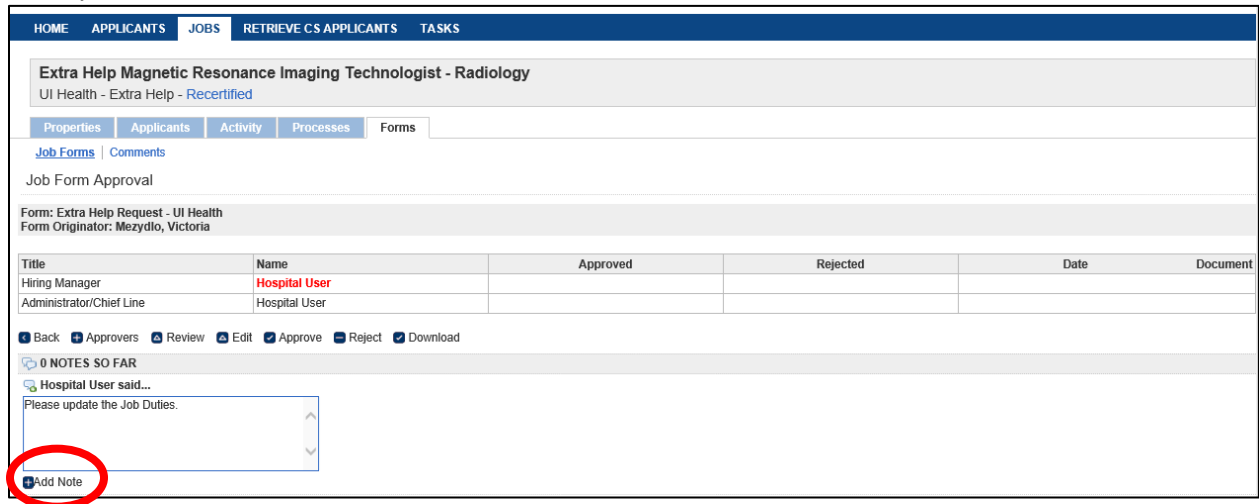
If you want to add notes regarding your review of the form, you can do so via the **Activity** tab of the job.

1. On the Job Form Approval page, locate the Notes box.



The screenshot shows the 'Job Form Approval' page for 'Extra Help Magnetic Resonance Imaging Technologist - Radiology'. The page includes a navigation bar with 'HOME', 'APPLICANTS', 'JOBS', 'RETRIEVE CS APPLICANTS', and 'TASKS'. Below the navigation bar, there are tabs for 'Properties', 'Applicants', 'Activity', 'Processes', and 'Forms'. The 'Activity' tab is selected. The page displays the job title, form name, and originator. A table shows the approval status for 'Hiring Manager' and 'Administrator/Chief Line', both marked as 'Hospital User'. Below the table, there are buttons for 'Back', 'Approvers', 'Review', 'Edit', 'Approve', 'Reject', and 'Download'. The 'Notes' section is highlighted with a red rectangle, showing '0 NOTES SO FAR' and a text input field with the placeholder 'Hospital User said...'. An 'Add Note' button is located below the input field.

2. Enter your comments and click the **Add Note** button.



This screenshot is identical to the previous one, but the 'Add Note' button is circled in red. The text 'Please update the Job Duties.' has been entered into the text input field.

These notes will be viewable by the users reviewing the job and the forms in the future.

HOME APPLICANTS **JOBS** PROSPECTS TASKS REPORTS

Extra Help Magnetic Resonance Imaging Technologist - Radiology
UI Health - Extra Help - Recertified

Properties Applicants Activity Processes Forms

Job Forms | Comments

Job Form Approval

Form: Extra Help Request - UI Health
Form Originator: Mezydlo, Victoria

Title	Name	Approved	Rejected	Date	Document
Hiring Manager	Hospital User				
Administrator/Chief Line	Hospital User				

Back Approvers Review Download

1 NOTE SO FAR

Thu 2/15/18 | Hospital User said...
Please update the Job Duties.

MC User4 said...

+ Add Note

Post-Review Options: Approve, Reroute, or Reject

Once you complete your review, you need to determine if you will approve, reroute, or reject the form.

Approving a Form

Approving a form indicates your review is complete and you confirm the information entered on the form. It also sends a notification to the next approver in the list, or, if you are the last approver, a notification to the Form Originator that your approval is complete.

1. From the **Job Form Approval** page, click the **Approve** button.

HOME APPLICANTS **JOBS** TASKS

Staff Nurse I - Surgery
UI Health - Nursing - Pending

Properties Applicants Activity Processes Forms

Job Forms | Comments

Job Form Approval

Form Originator: User1, MC

Title	Name	Approved	Rejected	Date
Hiring Manager	MC User2			
Administrator/Chief Line	MC User3			

Approvers View Back **Approve** Reject

- A green check (✓) indicates approval of the form by that person
- A name in **red** indicates the next person who needs to approve the form
- Dates and times of approvals are indicated in the far-right column

Rerouting a Form

Rerouting a form notifies the selected approver that you are returning the form back to them for re-review and possible changes. A reroute asks the selected approver to either confirm data on the form or to make suggested edits before sending the form through for approval. Notes added to the Activity tab (as outlined previously) will assist the user in determining why you have rerouted a form.

1. From the **Job Form Approval** page, click the **Reject** button.

The screenshot shows the 'Job Form Approval' page for 'Staff Nurse I - Surgery'. At the bottom, there is a navigation bar with buttons for 'Approvers', 'View', 'Back', 'Approve', and 'Reject'. The 'Reject' button is circled in red, and a red arrow points to it from the right.

Title	Name	Approved	Rejected	Date
Hiring Manager	MC User2	✓		12:54:48 PM Mon 11/19/12
Administrator/Chief Line	MC User3			

2. In the **Reject Form** list, select the appropriate **Reroute Form** position and click the **Save** button.

The screenshot shows the 'Reject Form' page. Under the 'Reroute Form' section, the 'Hiring Manager' position is selected with a radio button. A red arrow points to this selection from the left. At the bottom, the 'Save' button is circled in red.

Position	Name
<input checked="" type="radio"/> Hiring Manager	MC User2
<input type="radio"/> Reject Form	

3. This action reroutes the form back to the selected user and notifies them, via email, that you have rerouted the form. The email contains instructions for the user to review to determine the next steps for this position.

Rejecting a Form

Rejecting a form notifies the Form Originator that you have denied their request as submitted. A rejection asks the Form Originator to either start over with the submission of the form or to consider the form denied outright. Notes added to the Activity tab (as outlined previously) will assist the user in determining why you have rejected a form.

1. From the **Job Form Approval** page, click the **Reject** button.

The screenshot shows the 'Job Form Approval' page for 'Staff Nurse I - Surgery'. At the bottom of the page, there is a toolbar with buttons for 'Approvers', 'View', 'Back', 'Approve', and 'Reject'. The 'Reject' button is circled in red, and a red arrow points to it from the right.

Title	Name	Approved	Rejected	Date
Hiring Manager	MC User2	✓		12:54:48 PM Mon 11/19/12
Administrator/Chief Line	MC User3			

2. In the **Reject Form** list, select the **Reject Form** option and click the **Save** button.

The screenshot shows the 'Reject Form' dialog box. It contains a table with two columns: 'Reroute Form' and 'Name'. The 'Reject' section is selected, and the 'Reject Form' option is circled in red with a red arrow pointing to it from the left. At the bottom left, the 'Save' button is also circled in red.

Reroute Form	Name
<input type="radio"/> Hiring Manager	MC User2
<input checked="" type="radio"/> Reject Form	

3. This action rejects the form and notifies the Form Originator, via email, that you have rejected the form. The email contains instructions for the Form Originator to review to determine the next steps for this position.